AggieBuy – Status & Overview

Presented by the
AggieBuy Implementation Team
Today’s Presentation

- What is AggieBuy & why did we get it?
- Key Process Changes
- User Roles & Approval Workflows
- Implementation Timeline
- Next steps for your Department
- Site overview and demonstration
What is AggieBuy?

“The e-Commerce system website developed by Texas A&M University, in partnership with SciQuest, to provide a Catalog Marketplace and replace the purchasing functionality in FAMIS”

- Delegated purchases
- non-Delegated requisitions
- ITBs, RFPs and Purchase Orders
- Receiving & Approvals
- Invoice processing and matching
Why did we get it?

➢ To direct spend to “preferred” Suppliers
  • *Increased spending leverage*
  • *Better Contracts and lower prices*
➢ Reduce “Requisition-to-Pay” time and costs
➢ Increased compliance with Purchasing and Accounting guidelines
  • *Automation of rules and reminders*
➢ Reduce or eliminate paper documents
What happens to FAMIS?

- FAMIS will remain the “System of Record” for:
  - Chart of Accounts
  - Invoice payments processing
  - Supplier/payee database
  - Back-end TAMUS & State reporting

- AggieBuy is integrated with FAMIS
  - Almost-Real-Time – accounting, Supplier files
  - Batch – transaction date and approved Invoices
Key Process Changes

- Web-based application
  - SSO Login
  - Accessible from home and wireless devices

- Catalog Marketplace
  - Direct ordering
  - No $ limit for most Catalogs

- Departments issuing Purchase Orders

- Use of attachments for Requisitions
All transactions begin in a “Shopping Cart”
  - Cart becomes a Purchase Requisition when submitted

Shoppers not required to assign Account Code(s)

Shoppers will not assign Expense Object Code(s)
  - UNSPSC
  - Assigned by FMO personnel
  - Cross-referenced for reporting purposes

Centralized Invoicing / Vouchering
  - Electronic
  - Paper – entered by FMO personnel
  - Scheduled Payments
  - “Attaching” invoices vs. FTP process
  - No more PIPS!

(FAMIS will still handle Accounting and Supplier data)
Using AggieBuy to place Orders

- Catalogs
  - “Punch-out” or “Hosted”

- Contracts ("Master Orders")
  - Campus-wide or Department-specific

- Non-Catalog / non-Contract orders
  - “Limited” FAMIS orders
  - Requisitions for Procurement Services

- Internal Services
  - CIS, Physical Plant, Dining Services, etc.

- (Use of Payment Cards outside of AggieBuy)
AggieBuy will not be used for:

- Travel and Entertainment Expenses
- Employee Reimbursements
- Tort Payments
- Purchase made with a Payment Card
- Delegated “local” purchases made by TAMU-Qatar, paid with Qatari Riyal
1. **Shopper** – essentially equivalent to the “Creator” role in FAMIS, and is the default Role.

2. **Department Allocator** – may assign or change accounting information on a PR’s; may add line items to a PR and/or change quantities of existing line items.

3. **Approver** – approves or rejects PR’s.

4. **Final Approver** – equivalent to the “Signer” role in FAMIS; final approval releases a PO directly to the Supplier (delegated only) or a PR to Procurement Services for processing.

5. **Receiver** – enters quantities of goods or services received.
PR Approval Workflow

Shopper → Dept Allocator → Department Approver
- multiple
- optional

Account Validation and Budget Check → “Special” Approver
(Fume Hoods, radioactive, etc.)

Final Department Approver → Procurement Services (non-delegated)
PO released to Supplier (or Confirming) (delegated)

Encumbrance → Receiver
Implementation Timeline

- **Pilot Testing began** – *February 26, 2010*
  - College of Architecture
  - Mays Business School
  - Department of Chemistry

- **User Training began** – *Late May, 2010*

- **Campus-wide Roll-out began** – *Early June, 2010*
  - College of Liberal Arts
  - College of Agriculture
  - College of Vet Medicine

- **Campus-wide Roll-out complete** – *Late Oct., 2010*
User/department set-up and Training

➢ Workflow set-up 2-weeks in advance
  • Checklist / Authorization Memo / Template
  • Discuss and assign User Roles
  • Set-up Approval Workflow

➢ Training sessions 3-weeks in advance
  • Online videos – Shopper Role
  • Hands-on/Classroom – all other Roles
  • Additional workshops in Training Lab by request
  • Quick-Reference Guides
  • Help Desk
Implementation Team

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Wrap-up

➢ Test Site Orientation & Demo

➢ Q’s & A’s